

Reminders to bring:

1098-E Student Loan Interest
 1099-INT Interest from bank, etc.
 1099-R Retirement/IRA income
 W-2 Wages
 K-1 Income from Partnership/S Corporation
 1098 Mortgage interest

1098-T Tuition paid
 1099-DIV Dividends on stock
 1099-G State refund/unemployment income
 W-2G Gambling income
 1095-A/B/C Health Care
 SSA-1099 Social Security benefits

ITEMIZED DEDUCTIONS WORKSHEET

MEDICAL EXPENSES:

Insurance Premiums _____
 Doctors/Dentists/Nurses _____
 Glasses/Prosthesis _____
 Prescription Drugs _____
 Medical Mileage _____
 Long-term Care Insurance _____

CHARITABLE CONTRIBUTIONS:

Church/Synagogue _____
 Non-Profit Organizations _____

 Donations of non-monetary _____
 (Salvation Army/Goodwill, etc.) _____
 Charitable Mileage _____

TAXES:

Paid to State last year _____
 Property Taxes _____
 Ad Valorem/Personal _____

CASUALTY & THEFT LOSS:

Value before loss _____
 Value after loss _____
 Date of loss _____

INTEREST (Bring 1098):

Home Mortgage _____
 Home Equity _____
 Mortgage Insurance Premiums _____

MISCELLANEOUS:

Safe Deposit Box _____
 Tax Preparation Fee _____
 Gambling Losses _____

OTHER DEDUCTIONS / CREDITS:

Student Loan Interest _____
 Alimony Paid _____
 Name _____
 S/S# _____

Child Care Paid _____
 Name _____
 Address _____

 Federal ID# _____

Health Savings Account:

Contribution _____
 Distribution _____

IRA Contributions for Current Tax Year:

Education: Student: _____
 (need 1098T) Tuition: _____
 Year In School: _____

Taxpayer _____
 Date _____ IRA/Roth
 Spouse _____
 Date _____ IRA/Roth